

**PETITION REQUEST – Instructional Materials Funds Realignment Program (IMFRP)**PR-1 (7/03) <http://www.cde.ca.gov/waiver/>

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Send Original plus one copy to:

Waiver Office, California Department of Education

1430 N Street, Suite 5602

Sacramento, CA 95814

**Faxed originals will not be accepted!**

						CDS CODE					
LEA:						Contact/recipient of approval/denial notice:				Contact Person's E-Mail Address:	
Address:						City:				Zip	
										Phone (and extension, if necessary): (    ) -    x	
										Fax Number: (    ) -	
Period of Request: (month/day/year)						Local Board Approval Date: (Required)				Date of Public Hearing: (Required)	
From:						To:					
<b>LEGAL CRITERIA</b>											
<p><b>1. Under the authority of the petition process, E.C. 60421(d) and E.C. 60200(g) this district requests the State Board of Education to authorize the use of any "instructional materials allowances" for the purchase of other instructional materials as listed:</b></p> <p>Brief description: publisher name, grade level, edition, and price list of the materials to be purchased and total amount of instructional materials allowances to be spent in this manner: (If insufficient space add to attached narrative)</p>											
<p><b>2. Public Hearing Requirement.</b> A public hearing is not simply a board meeting, but a properly noticed public hearing held during a board meeting at which time the public may testify on the petition request. Distribution of local board agenda does not constitute notice of a public hearing. Acceptable ways to advertise include: (1) print a notice that includes the time, date, location, and subject of the hearing in a newspaper of general circulation; or (2) in small school districts, post a formal notice at each school and three public places in the district.</p> <p><b>How was the required public hearing advertised?</b></p> <p><input type="checkbox"/> Notice in a newspaper? <input type="checkbox"/> Notice posted at each school? <input type="checkbox"/> Other: _____ (please list)</p>											
<p><b>3. Certification by Local Board for Petition to Purchase Other Instructional Materials with "Instructional Materials Allowances"</b></p> <p>In checking each of the boxes below, the local governing board acknowledges its certification or understanding of the following:</p> <p><input type="checkbox"/> Authorizes the submission of the petition to the State Board of Education under <b>E.C. 60421(d)</b>: <i>"Notwithstanding any other provision of law, pursuant to subdivision (g) of Section 60200, the State Board of Education may authorize a school district to use any state basic instructional materials allowance to purchase standards-aligned materials as specified within this part."</i> (AB 1781, Statutes of 2002)</p> <p><input type="checkbox"/> Verifies that the local governing board has determined that the state-adopted materials do not promote the maximum efficiency of pupil learning in the district or school(s) as specified under E.C. 60200(g).</p> <p><input type="checkbox"/> Verifies that the requested materials have been evaluated for consistency with the state curriculum frameworks and with the content standards that have been adopted by the State Board of Education, and that the materials are aligned and reasonably adhere to the standards in this subject.</p>											

**PETITION REQUEST**

PR-1 (2/03)

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**Certification by Local Board for Petition to Purchase Other Instructional Materials with “Instructional Materials Allowances” (Continued)**

- ☐ If the **instructional materials requested for purchase** through this petition (or the **instructional material proposed by the district to supplement a non adopted program** have not been previously reviewed by the California Department of Education (CDE), for the purposes of adoption or the review of another district’s petition request, the district must include with the petition request:
- A complete set of standards maps indicating alignment with the grade-by-grade standards for the material. Forms are available at: *www. (Hilary to do link)*, many publishers should have these standards maps available.
  - A complete set of the actual instructional materials must also be mailed to the SDE for review against those standards maps. Call the Waiver Office at (916) 319-0824 for mailing instructions.
- ☐ Verifies that the proposed materials have passed state or local level legal compliance review, or are exempt from such as review. Check approved list at: <http://www.cde.ca.gov/cfir/lc/>

**After considering the issues listed above, this local governing board has determined that the purchase of the proposed resources will promote the maximum efficiency of pupil learning in our agency, and has approved the submission of this petition to the State Board of Education.**

Signed: \_\_\_\_\_, School Board President of \_\_\_\_\_ (LEA)

**Other Required Attachments to the Petition Request Include:**

- Brief description, publisher name, grade levels, and price list of instructional materials to be purchased and total amount of “instructional materials allowances” to be spent in this manner (if not already included in Item 1. on the first page of the Petition Request);
- A narrative describing the reasons for the petition based on student needs; evidence of a well designed, Standards-Aligned Curriculum Plan, the local process for review of standards maps and framework alignment of this particular material, including a description of how weaknesses in these materials will be supplemented (if necessary);
- Evidence of exemplary academic achievement or growth, by district, school(s), and where appropriate, by subject matter, grade level and significant subgroup. (Except for petitions for “grade level extensions of adopted programs”) The forms are available at: *www. (Hilary to add)*

**District or County Certification – I hereby certify the information provided on this application is correct and complete.**

Signature of Superintendent or Designee:  > _____	Title:  _____	Date:  _____
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**FOR CALIFORNIA DEPARTMENT OF EDUCATION USE ONLY**

California Department of Education Recommendation: <input type="checkbox"/> Approve <input type="checkbox"/> Approve with conditions <input type="checkbox"/> Deny		
Staff Name (type or print):	Staff Signature:  > _____	Date:
Unit Manager (type or print):	Unit Manager Signature:  > _____	Date:
Division Director (type or print):	Division Director Signature:  > _____	Date:
Deputy (type or print):	Deputy Signature:  > _____	Date:

## IMFRP - Petition Process - Instructions

Assembly Bill 1781, statutes of 2002, established the Instructional Materials Funding Realignment Program (E.C. 60420 et seq.) and amended E.C. 60240, which continues (and changes) the Instructional Materials Fund. This fund source replaces both the “old” Instructional Materials Fund (E.C. 60240 et seq.) and the Schiff-Bustamante Fund (E.C. 60450 et seq.). Both of these fund sources are being eliminated on June 30, 2002, although districts may spend carryover for an additional two years under the “OLD” rules for each.

There are now two references regarding the Petition Process for the new Instructional Materials Fund Realignment Program (IMFRP) as follows:

### Education Code (EC) Section(s):

***E.C 60421 (d)*** “Notwithstanding any other provision of law, pursuant to subdivision (g) of **Section 60200**, the State Board of Education may authorize a school district to **use any state basic instructional materials allowance to purchase standards-aligned materials as specified within this part.**” (AB 1781, Statutes of 2002)

***E.C. 60200(g)*** “If a district board establishes to the satisfaction of the state board that the state-adopted instructional materials do not promote the maximum efficiency of pupil learning in the district, the state board shall authorize that district governing board to use its instructional materials allowances to purchase materials as specified by the state board, in accordance with standards and procedures established by the state board.” (E.C.60200 (g) the old IMF petition language now referenced in AB 1781, Statutes of 2002)

**The following actions should be taken at the local level and documented in a written narrative by the district before requesting the petition:**

1. Through the process established by the local board for instructional materials adoption process and based on the needs of the schools and students in the district show the implementation of a well designed, Standards-Aligned Curriculum Plan that best promotes the maximum efficiency of pupil learning in the district.
  - The goals and objectives in the subject area and information on how the goals were developed.
  - Information describing the student population that will be using the proposed resources: e.g., relevant test scores, ethnic distribution, socio-economic data, participation in specialized or categorical programs a comparison of the proposed resources with state adopted programs identifying differences and describing why the state adopted resources do not promote the maximum efficiency of pupil learning in the district;
  - A description of the process by which these proposed resources were evaluated for standards alignment. (See item 2., below for more suggestions on this section);
  - The relevant projected timeline for the purchase of the proposed resources, the fund source (current year or carryover), and the total amount requested to be spent on the requested materials; and
  - The plans for staff development for teachers regarding the use of the resources, how teachers will use the resources.

2. Through this comprehensive evaluation process, choose instructional materials that will promote the maximum efficiency of pupil learning in the district. This process will include as applicable:
  - Verify that the materials are consistent with the state Curriculum Frameworks;
  - Verify that where the State Board of Education has adopted Content Standards, that the materials are aligned sufficiently with and reasonably adhere to these standards. Standards Maps for each grade level for the proposed instructional materials should be thoroughly reviewed by the committee for this purpose.
  - Where the review of the standards maps for the proposed instructional materials against the state adopted Content Standards show gaps, develop a plan to remedy these weaknesses in the implementation of the material at each grade.
  - For the purchase of specialized materials to help “bridge the gaps” between the adopted texts and the abilities of pupils, due to their handicapping condition or other specialized needs, consideration of the individual educational needs of these pupils. In these cases, although adopted materials may be “available,” the students require other materials to “bridge the gaps” in learning ability.
3. Establish that the materials are in compliance with *E.C.* 60040 through 60048 et seq. and the SBE’s Standards for Evaluation of Instructional Materials with respect to Social Content, as determined by a state Legal and Social Compliance review conducted by the California Department of Education (list available at <http://www.cde.ca.gov/cfir/lc/> by publisher or title materials. If there has been no statewide review, the district may conduct a local level legal compliance review. In addition, some materials are exempt from legal compliance and may also be requested and purchased after a petition approval.

**Your petition request is now ready to go to your local board for approval.**

1. The Local Board must hold a “properly noticed public hearing” on the submission of the petition to the State Board of Education, and the proposed purchase and use of the “other” standards aligned instructional materials. The Board must also approve the **“Certification by Local Board for Petition to Purchase these Instructional Materials with “Instructional Materials Allowances”** to be signed by the local board president (this Certification is now part of the Petition Request form itself).
2. Include the **Required Other Attachments** to the Petition Request:
  - Brief description, publisher name, grade levels, and price list of instructional materials to be purchased and total amount of “instructional materials allowances” to be spent in this manner (if not already included in item 1. on the first page of the Petition Request)
  - A narrative describing the reasons for the petition, based on student needs; evidence of a well designed, Standards-Aligned Curriculum Plan, the local process for review of standards maps and framework alignment of this particular material, including a description of how weaknesses in these materials will be supplemented (if necessary); verification of Legal and Social compliance.
  - A copy of the latest district or COE local Board Resolution regarding compliance with E.C. 60119. The governing board shall hold a public hearing or hearings at which the governing board shall encourage participation by parents, teachers, members of the community interested in the affairs of the school district, and

bargaining unit leaders, and shall make a determination, through a resolution, as to whether each pupil in each school in the district has, or will have prior to the end of that fiscal year, **sufficient textbooks or instructional materials, or both, in each subject that are consistent with the content and cycles of the curriculum framework adopted by the state board.** Check frameworks and recent adoption lists at: <http://www.cde.ca.gov/cfir/>

- Evidence of exemplary academic achievement or growth, by district, or school(s), and where appropriate, by subject matter, grade level, and significant subgroup. These forms are available at: [www. \( Hilary to add \)](http://www.cde.ca.gov/cfir/)
- If the **instructional materials requested for purchase** through this petition (or the **instructional material proposed by the district to supplement a non adopted program** have not been previously reviewed by the California Department of Education (CDE), for the purposes of adoption or the review of another district's petition request, the district must include with the petition request:
  - A complete set of standards maps indicating alignment with the grade level standards for the subject matter. Forms are available at: [www. \( Hilary to do link \)](http://www.cde.ca.gov/cfir/), many publishers should have these standards maps available.
  - A complete set of the actual instructional materials must also be mailed to the SDE for review against those standards maps. Call the Waiver Office at (916) 319-0824 for mailing instructions.

**Petitions, if approved by the State Board of Education will be:**

- For a limited period of time (as specified in "period of request"), and will not become permanent;
- For a specified amount of expenditure of "instructional materials allowances" dollar amount and percentage;
- For a specified program(s) or resource(s), at specific grade levels and copyright years.

**In all cases, Petitions should be prospective so that funds are not spent before the petition approval by the state Board of Education.**